

## Product / Service Feature Guidance – Oracle Intelligent Advisor

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### Disclaimer

The purpose of this document is to outline some of the product features currently available or under consideration for the Oracle service offering referenced above, with a focus on privacy and security related controls. Customers should refer to the available on-line product documentation for a more complete description of available product features and functionality.

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Privacy Features	Description	Oracle Documentation
<b>Data Minimization</b>	<ul style="list-style-type: none"> <li>• Access to data available through the Intelligent Advisor Hub is controlled by user roles. Roles include Hub Administrators, Authors, Managers, Mobile Users, and API users. No end-users interact with the Hub.</li> <li>• No personal data is generated or end-user information stored as part of using the Intelligent Advisor Hub.</li> </ul>	<ul style="list-style-type: none"> <li>• Permissions: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Project_Administrator_Guide/Permissions/Permissions.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Project_Administrator_Guide/Permissions/Permissions.htm</a></li> </ul>
<b>Data Deletion at Contract Term or Termination</b>	<ul style="list-style-type: none"> <li>• Data is deleted 60 days after Service Cloud contract termination per Hosting &amp; Delivery Policies.</li> </ul>	<ul style="list-style-type: none"> <li>• Cloud Services Hosting &amp; Delivery Policies: <a href="http://www.oracle.com/us/corporate/contracts/cloud-services/index.html">http://www.oracle.com/us/corporate/contracts/cloud-services/index.html</a></li> </ul>
<b>Data Portability</b>	<ul style="list-style-type: none"> <li>• No end-user data is stored in Intelligent Advisor; any end-user data captured as a result of an Interview is mapped into an integrating application (e.g., Fusion B2B Service, Customer on-premise application, etc.). Additional controls may be available in the integrating application.</li> </ul>	<ul style="list-style-type: none"> <li>• Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> <li>• CX Sales and B2B Service User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Fusion_User_Guide/Welcome/Fusion_User_Guide.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Fusion_User_Guide/Welcome/Fusion_User_Guide.htm</a></li> <li>• Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL_2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL_2449553</a></li> </ul>

<p><b>End-user Access and Other Requests</b></p>	<ul style="list-style-type: none"> <li>No end-user data is stored in Intelligent Advisor; any end-user data captured as a result of an Interview is mapped into an integrating application (e.g., Fusion Sales &amp; B2B, Customer on-premise application, etc.). Additional controls may be available in the integrating application.</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> <li>Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> </ul>
<p><b>Right to Erasure and/or Right to be Forgotten</b></p>	<ul style="list-style-type: none"> <li>No end-user data is stored in Intelligent Advisor; any end-user data captured as a result of an Interview is mapped into an integrating application (e.g., Fusion Sales &amp; B2B Service, Customer on-premise application, etc.). Additional controls may be available in the integrating application. Users (Customer employees) are disabled from accessing and authoring new policies through standard product usage.</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> <li>Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> <li>Permissions: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Project_Administrator_Guide/Permissions/Permissions.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Project_Administrator_Guide/Permissions/Permissions.htm</a></li> </ul>
<p><b>Notice and Consent</b></p>	<ul style="list-style-type: none"> <li>This would be part of the capabilities of the integrating application (e.g., Fusion Sales &amp; B2B Service, Customer on-premise application, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> </ul>

	<p>to establish a notice prior to any end-user data captured as a result of an Interview.</p>	<p><a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">sioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></p> <ul style="list-style-type: none"> <li>Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> <li>Permissions: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Project_Administrator_Guide/Permissions/Permissions.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Project_Administrator_Guide/Permissions/Permissions.htm</a></li> </ul>
<p><b>Availability</b></p>	<ul style="list-style-type: none"> <li>No end-user data is stored in Intelligent Advisor; any end-user data captured as a result of an Interview is mapped into an integrating application (e.g., Fusion Sales &amp; B2B Service, Customer on-premise application, etc.). Additional controls may be available in the integrating application.</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> <li>Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> <li>Permissions: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Project_Administrator_Guide/Permissions/Permissions.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Project_Administrator_Guide/Permissions/Permissions.htm</a></li> </ul>

<b>Tracking Technologies</b>	<ul style="list-style-type: none"> <li>• Cookies are used: <ul style="list-style-type: none"> <li>○ For functional purposes, to associate a session ID with the end user's interaction with the application;</li> <li>○ For billing, so that if the same user interacts with different browsers on the same device during the same time period, the customer is only charged for a single billable session. Any IP addresses captured are anonymized.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• *Cookie information can be found under KB Article #10074: <a href="https://cx.rightnow.com/app/answers/detail/a_id/10074">https://cx.rightnow.com/app/answers/detail/a_id/10074</a></li> </ul> <p>*Note: A valid cx.rightnow.com account is required to access this document.</p>
<b>Security Features</b>	<b>Description</b>	<b>Oracle Documentation</b>
<b>Multi-factor authentication</b>	<ul style="list-style-type: none"> <li>• Starting with the November 2017 release access to Intelligent Advisor Hub supports integration with Oracle Identity Cloud Service (IDCS) that enables multi-factor authentication.</li> <li>• End-user authentication would be part of the capabilities of the integrating application (e.g., Fusion Sales &amp; B2B Service, Customer on-premise application, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> <li>• Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> <li>• Identity Cloud Service (for use with Digital Customer Support): <a href="https://docs.oracle.com/en/cloud/paas/identity-cloud/u aids/getting-started-oracle-identity-cloud-service1.html">https://docs.oracle.com/en/cloud/paas/identity-cloud/u aids/getting-started-oracle-identity-cloud-service1.html</a></li> </ul>
<b>IP white-listing</b>	<ul style="list-style-type: none"> <li>• Customers can request IP white-listing for their instances to restrict access based on IP via the Technical Support team.</li> </ul>	
<b>Separation of duties</b>	<ul style="list-style-type: none"> <li>• Tasks performed through the Intelligent Advisor Hub are controlled by user roles. Roles include</li> </ul>	<ul style="list-style-type: none"> <li>• Permissions: <a href="http://documentation.custhelp.com">http://documentation.custhelp.com</a></li> </ul>

	Hub Administrators, Authors, Managers, Mobile Users, and API users.	<a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Project_Administrator_Guide/Permissions/Permissions.htm">com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Project_Administrator_Guide/Permissions/Permissions.htm</a>
<b>Flagging Special Categories of Data</b>	<ul style="list-style-type: none"> <li>No end-user data is stored in Intelligent Advisor; any end-user data captured as a result of an Interview is mapped into an integrating application (e.g., Fusion Sales &amp; B2B Service, Customer on-premise application, etc.). Additional controls may be available in the integrating application.</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> <li>Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> </ul>
<b>Separate auditing and "detective control" privileges</b>	<ul style="list-style-type: none"> <li>No specific functionality provided by this service.</li> </ul>	
<b>Features Limiting Oracle's access to customer data</b>	<ul style="list-style-type: none"> <li>No specific functionality provided by this service.</li> </ul>	
<b>Encryption</b>	<ul style="list-style-type: none"> <li>In transit data is transmitted via HTTPS. Customers can configure their own certificates for HTTPS.</li> <li>At rest data stored in Oracle are on encrypted file systems; Oracle manages the keys.</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> <li>Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> </ul>
<b>Anonymization</b>	<ul style="list-style-type: none"> <li>No end-user data is stored in Intelligent Advisor; any end-user data captured as a result of an Interview is mapped into an integrating application (e.g., Fusion Sales &amp; B2B Service,</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> </ul>

	<p>Customer on-premise application, etc.). Additional controls may be available in the integrating application.</p>	<p><a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">ontent/Guides/Welcome/Welcome.htm</a></p> <ul style="list-style-type: none"> <li>Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> </ul>
<b>Pseudonymization</b>	<ul style="list-style-type: none"> <li>No end-user data is stored in Intelligent Advisor; any end-user data captured as a result of an Interview is mapped into an integrating application (e.g., CX Fusion Sales &amp; B2B Service, Customer on-premise application, etc.). Additional controls may be available in the integrating application.</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> <li>Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> </ul>
<b>Data Masking</b>	<ul style="list-style-type: none"> <li>No end-user data is stored in Intelligent Advisor; any end-user data captured as a result of an Interview is mapped into an integrating application (e.g., Fusion Sales &amp; B2B Service, Customer on-premise application, etc.). Additional controls may be available in the integrating application.</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> <li>Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> </ul>
<b>Truncation</b>	<ul style="list-style-type: none"> <li>No end-user data is stored in the OPA service; any end-user data captured as a result of an Interview is mapped into an integrating application (e.g., .g., Fusion Sales &amp; B2B Service, Customer on-premise application,</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> </ul>

	<p>etc.). Additional controls may be available in the integrating application.</p>	<p><a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=c_Oracle_Policy_Automation_Cloud_Service_dn1131806">ontent/Guides/Welcome/Welcome.htm</a></p> <ul style="list-style-type: none"> <li>Integration with CX B2C: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=c_Oracle_Policy_Automation_Cloud_Service_dn1131806">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=c_Oracle_Policy_Automation_Cloud_Service_dn1131806</a></li> <li>CX Sales and B2B Service User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/PolicyAutomation/en/Default.htm#Guides/Engagement_Cloud_User_Guide/Engagement_Cloud_User_Guide.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/PolicyAutomation/en/Default.htm#Guides/Engagement_Cloud_User_Guide/Engagement_Cloud_User_Guide.htm</a></li> <li>Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> </ul>
<b>Tokenization</b>	<ul style="list-style-type: none"> <li>No end-user data is stored in Intelligent Advisor; any end-user data captured as a result of an Interview is mapped into an integrating application (e.g., Fusion Sales &amp; B2B Service, Customer on-premise application, etc.). Additional controls may be available in the integrating application.</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent Advisor User Guide: <a href="http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm">http://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm</a></li> <li>Integration with CX Sales: <a href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553">http://www.oracle.com/pls/topic/lookup?ctx=cloud&amp;id=OASAL2449553</a></li> </ul>
<b>Logging</b>	<ul style="list-style-type: none"> <li>No personal data data capture, therefore no application transactional logging.</li> </ul>	



	<ul style="list-style-type: none"><li>• Interview usage statistics are captured for experience improvements. No end-user data is collected.</li></ul>	
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